

# State of Wisconsin Department of Administration

Administrator Guide to the State of Wisconsin Medical Leave & FMLA Application

Revised: July 2021

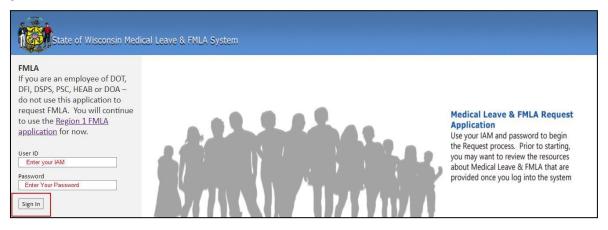
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# How to Access Leave Requests

- 1. Go to <a href="https://fmla.wi.gov">https://fmla.wi.gov</a>
- 2. Enter your IAM in the User ID field and your password (this the same password you use to log into STAR)
- 3. Click Sign In



- 4. The following screen will be displayed. Click on **Medical Leave Coordinators** to access requests that have been submitted.
  - You must have the security role of **AM\_FMLA\_COOR** in the STAR Human Resources system to access the Medical Leave Coordinators section of this application.



5. All requests that are **NOT** in Denied, Closed or Withdrawn status within your row-level security as defined in STAR will appear on this page. For example, if you have regional security, you will see requests for your entire region. If you have agency or departmental security, you will see requests within the agency or department.

Click on the Archive button to access requests in Denied, Closed, or Withdrawn status.



6. To review the details of the request, click anywhere on the row that contains the request.



# How to Navigate the FMLA Requests Page

The following fields are displayed on the FMLA Requests Page:

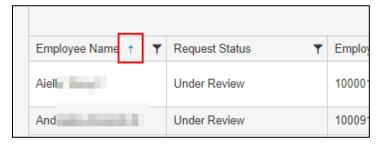
- Agency Name
- Department Name
- Employing Unit
- Employee Name
- Request Status
- FMLA Eligible
- WI FMLA Eligible
- Employee ID
- Submission Date
- Reason for Leave (Parental, Employee Illness, Family Illness, Service Member Care, Exigency)
- Leave Type (Block, Intermittent or Both)
- Leave Begin Date (earliest leave date if multiple leave types are requested)
- Leave End Date (latest leave date if multiple leave types are requested)
- Agency Name
- Department Name
- Assigned Coordinator

There are several tools available to help you navigate the FMLA Requests Page.

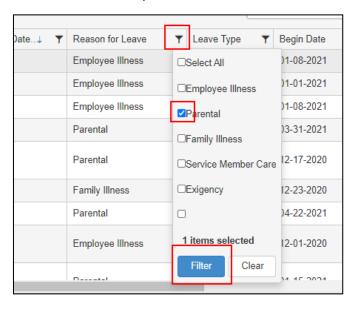
- 1. Click on any of the **header rows** to sort the information in either ascending or descending order.
  - o For example, if you click once on the Employee Name header:



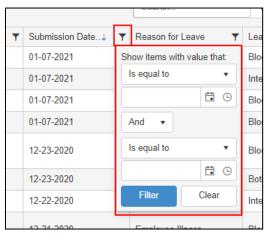
The names will be sorted in alphabetical order and an arrow ↑ will appear in the column header to let you know that sorting is on that column.



- 2. Click on the **filter icon** in any header row to filter on information in the column.
  - o Select the box(es) next to the information you want to filter and click the **Filter** button.



o If you want to filter on dates, more options are available to you.



o Click the Clear Filters button at the top right of the grid to clear all filters in place.

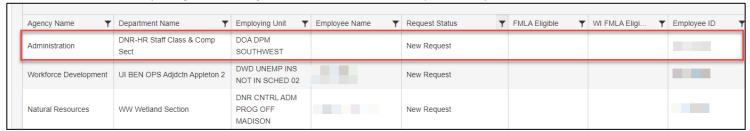


3. The Search box allows you to search for an Employee ID only. When you type in the Employee ID, all requests associated with the Employee ID will display on the page.



# Reviewing and Accepting an FMLA Request

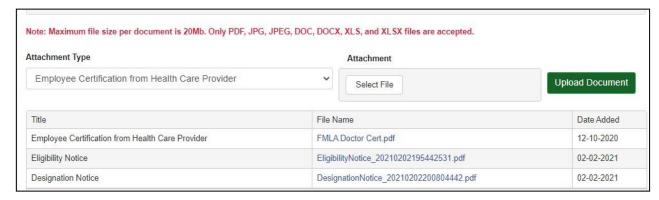
1. From the FMLA Request grid, click anywhere in the row of the request that you would like to review.



2. The following buttons will be displayed at the top of page:



- Extend or Modify do not use this is for employees only to update the information in their request
- Withdraw can be used by the employee or Medical Coordinator to withdraw the request
- Check List brings you to the Coordinator Workspace page
- Edit used by the Medical Coordinator to edit a request
- Delete used by the Medical Coordinator to delete request requests should only be deleted if it was a true error (i.e. duplicate request). If an employee no longer has need for FMLA they should use "Withdraw"
- Audit Log will bring you to a log of all the different iterations of the request
- Back to HR List will bring you back to your list of FMLA requests
- 3. On this screen you may review all details of the request and upload files on behalf of the employee. The information on this page is exactly what the employee sees relative to their request.
  - Attachment Section you will see any documents the employee attached to their request. You are also able to attach documents here, but you may also attach documents from the HR Checklist.



- The following attachment types are available:
  - Employee Certification from Health Care Provider
  - Family Member Certification from Health Care Provider
  - Fitness for Duty Certification Return to Work
  - Doctor's Note
  - Military Certification/Orders
  - Non-FMLA Documents (e.g. Leave of Absence)
  - Other
- The following file types can be uploaded into the application:
  - PDF
  - JPG and JPEG (image files)
  - Word documents (.doc, .docx)
  - Excel documents (.xls, .xlsx)
  - .msg (Outlook files) can be uploaded on the HR side of the application only
- Employee Information Section this information is populated with information from STAR. The employee can update their Email, Phone Number and Home Address During Leave fields.
- o **Information about Additional Jobs** If an employee has more than one Empl Record, the additional jobs will be displayed.
- Reason for Leave Section the employee can select only one option.



Leave Request Explanation Section – this is the employee's leave request explanation – 500 characters

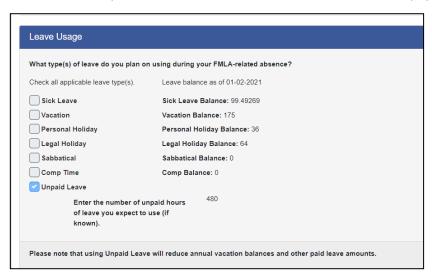
#### Leave Request Explanation

When my own serious health condition flares up it prevents me from performing all essential job duties.

 Dates of Leave Section – the employee can enter a block of leave and/or intermittent or reduced work schedule leave. This section also includes a section to describe the requested intermittent leave or reduced work schedule – it can be up to 500 characters in length

<u>a</u>				
Dates of Leave				
You must enter your anticipated or actual dates of leave below. Check all that apply.				
A block of leave				
Leave Start Date:		Leave End Date:		
Intermittent leave or reduced work schedule				
Leave Start Date:	01-04-2021	Leave End Date: 12-31-2021		
Please describe the requested intermittent leave or reduced work schedule below.				
Unknown. Flare-ups are not predictable. On average lasting 0.5 to 3 days, 2 to 12 times per month.				
TO THE STATE OF TH				

 Leave Usage Section – the employee can check boxes next to the leave type(s) they want to use during their leave. This is informational only. The most recent leave balances from STAR auto-populate in this section.



- Submission Acknowledgement this section provides the name of the person who submitted the form and the submission date.
- You will see a Submit Request and an Update button on this page. This is because these buttons are also available to the employee. DO NOT click these buttons. If you need to make changes to the request, you will use the Edit button at the top of the page. See the <a href="How to Edit a Request Section">How to Edit a Request Section</a> of the job aid for details.



4. If the request is in **New Request** status (the application status is displayed in the upper left of the page), click the **Accept Request** button at the top of the page to assign the request to yourself.



5. Once you accept the request, the status of the request will change to **Under Review** and the buttons available at the top of the page will update. Click the **Check List** button to access the FMLA HR Checklist/FMLA Coordinator Workspace page.



• The FMLA checklist will open in a new tab and the original request will remain open in a separate tab in case you need to move between the two pages.



# Medical Coordinator Administrative Page (FMLA HR Checklist & FMLA Coordinator Workspace)

This is the administrative page where you go to create the notices along with reviewing eligibility requirements and other information.

#### Accessing the Medical Coordinator Administrative Page

- 1. You can access the page from a request that is in any status except Draft. If a request is in Draft status, the employee has not submitted the request yet, so the page is not available.
- 2. Once you access an employee's request from the FMLA requests list, click on the **Check List button** at the top of the page to access the page.



- 3. A new tab opens so that you may view the employee request details while the checklist is open.
- 4. The **Request Status** appears at the top of page. This status is sometimes is updated automatically by the system and must sometimes be updated by the Medical Coordinator.
  - a. To manually update the Status, click on the **arrow** to select the applicable status and then click the **Update Status** button.



# **Understanding Request Statuses**

Status	Definition	How Updated
Draft	Request started but not submitted by the employee	Automatically assigned by the system when the employee saves their request
New Request	Request submitted by employee but not assigned to a Medical Coordinator	Automatically assigned by the system when employee submits their request
Under Review	Request is assigned to a coordinator and is under initial review	Automatically assigned by the system when coordinator "Accepts" request
Change Request	Employee uses the Extend/Modify button to make change to the original request after it has been accepted by the coordinator.	Automatically assigned by the system when employee submits a change request. The original coordinator is still assigned to the request, but the status is updated to Change Request.
Withdrawn	Employees submits a request to withdraw application	Automatically assigned by the system when employee withdraws their request.
Approved	Status once the request is approved and a Designation Notice has been created	Medical coordinator must manually update the status to Approved.
Denied	Status once the request has been Denied	Medical coordinator must manually update the status to Denied
Awaiting Documentation	Status when Medical Coordinator is awaiting any type of documentation. There is a report that monitors this, so it is recommended to update the status to this any time you are waiting for any type of documentation.	Medical coordinator must manually update the status to Awaiting Documentation
Agency Designation	Status when the agency designates the leave and checks the box next to Agency Designation in the FMLA Coordinator Workspace	Medical coordinator must manually update the status to Agency Designation
Closed	Status when the leave period is over, and all required documentation has been received	Medical coordinator must manually update the status to Closed

#### **FMLA HR Checklist**

The FMLA HR Checklist is meant to help Medical Coordinators determine and document eligibility.

#### Information from STAR

The following fields are pulled in from STAR:



- Refreshed As Of this is last time information was pulled from STAR
  - This information will refresh every time you access the check list. If you click the **Lock** button, the values will no longer refresh on the page.
- Employee Name
- Continuous Service Date
- FMLA Hours Used YTD (this will only pull in hours used that have been confirmed through payroll)
- Enrolled in ICI (if checked, the employee is enrolled in Income Continuation Insurance

#### Information Entered by Medical Coordinator

The remainder of the values in the FMLA HR Checklist must be manually completed.



**Note:** Values entered in the Hours Worked and Hours Paid fields must be entered as whole numbers. Check the box next to **Display Eligibility** to display FMLA/WFMLA eligibility (either **Yes** or **No**) on all FMLA grids in the application.

#### FMLA Eligibility Criteria

<u>Federal FMLA Eligibility Criteria</u>: One year of state service and must have worked (do not include leave codes) 1250 hours in the 12 months before the start of leave.

<u>Wisconsin FMLA Eligibility Criteria</u>: One year of state service and must have been paid (includes leave codes) 1000 hours in the 52 weeks prior to the start of leave.

#### Calculating FMLA Eligibility

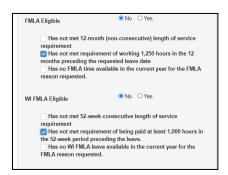
- Verify employee has at least one year of service from the **Continuous Service Date**.
  - o If less than one year, run the WI\_HR\_PER\_ROSTER Query (See Reports section) as a double check
- In STAR, run the WI\_ABS\_TL\_HOURS\_FMLA Query to Excel



- $\circ$  If first day of leave for the request is 1/1/2021, your date inputs would be 1/1/2020 12/31/2020
- Filter the Time Reporting Codes (TRCs) needed for each category, total the hours, and enter the values
  in the fields on the page. Only whole numbers can be entered in these fields.
  - i. For hours paid, filter out any TRCs like "standby supplemental" or "holiday half hour paid"
  - ii. For hours worked, filter out all leave TRC's

If you determine the employee is eligible for FMLA and/or WI FMLA, check the radio button next to Yes.

**If you determine the employee is not eligible** for FMLA and/or WI FMLA, check the radio button next to **No** and select the applicable reason.



Keep in mind that even if any employee is not eligible for FMLA, they may be eligible for other protected leave programs. If they are eligible for either leave program below, check the applicable box.

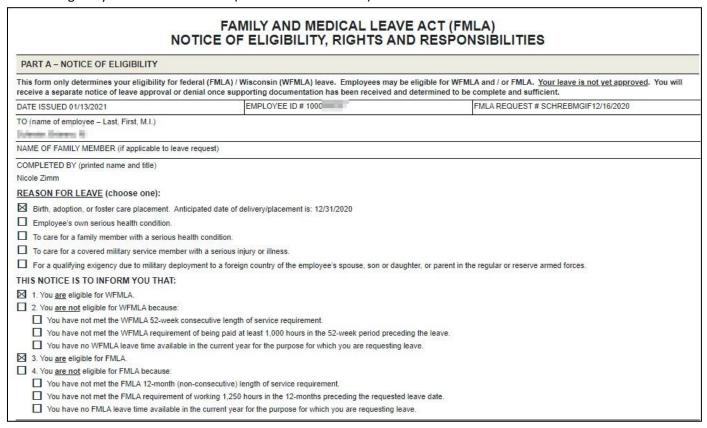


# Eligibility Notice

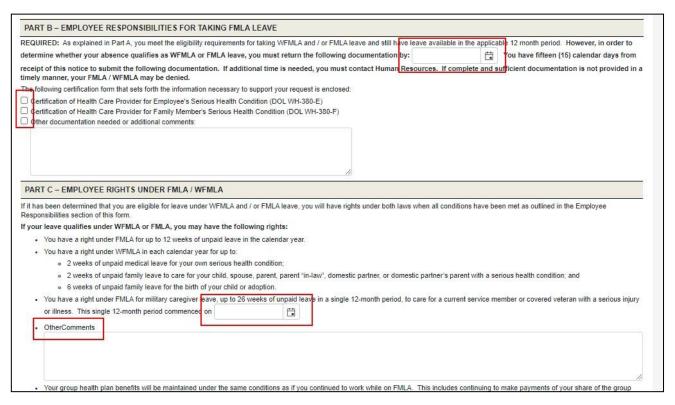
1. Once you have determined FMLA eligibility and are ready to create your notice, check the **Display Eligibility** checkbox and click on the **Save and Create Eligibility Notice** at the bottom of the FMLA HR Check List.



- 2. The Eligibility Notice needs to be provided to the employee 5 days after the request submission date. The following details are pre-populated on the form:
  - Date Issued (today's date)
  - Employee ID
  - FMLA Request #
  - Employee's Full Name
  - Name of Family Member (if applicable)
  - Coordinator's Name
  - Reason for Leave (and anticipated date of delivery/placement if applicable)
  - Eligibility Checkbox Selections (from the HR Checklist)



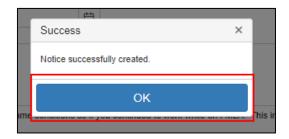
- 3. The Medical Coordinator should then manually complete any fields needed in Part B and Part C of the form.
  - a. If a medical certification is needed, employees have 15 days from the date of notice to submit medical.



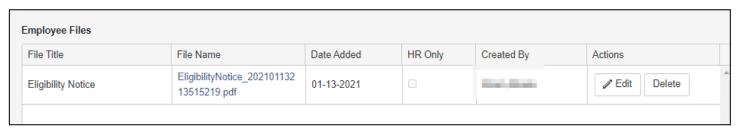
4. Once the form is complete, click the Finalize Eligibility Notice button



- a. If you do not want to finalize, click Cancel to go back
- 5. The following message will pop-up once the notice is created. Click OK.

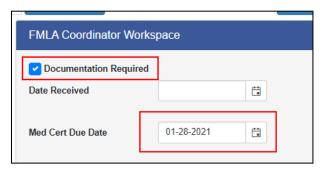


6. The Eligibility Notice will populate in the Employee Files section of Additional Documentation. The form will also be visible to the employee.

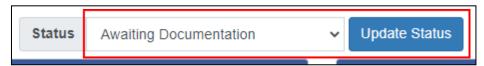


a. If you need to create a new notice to update information, you can click the **Save and Create Eligibility Notice** button again to create a new form.

7. If you indicated that documentation was required on the form, the checkbox next to **Documentation Required** and the **Med Cert Due Date** will be populated in the FMLA Coordinator Workspace section of the page.



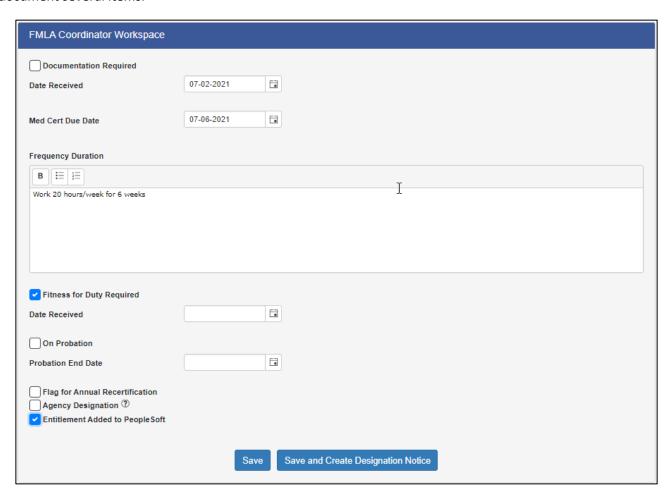
a. You should manually update the Status of the application to **Awaiting Documentation** in this situation.



8. If you have received medical, or none is required, go to the FMLA Coordinator Workspace to complete the request, and issue the Designation Notice.

#### FMLA Coordinator Workspace

The FMLA Coordinator Workspace is used to help the Medical Coordinator track the request through all stages, as well as document several items.



- Documentation Required Checkbox originally populated form Eligibility Notice. You may uncheck this if
  nothing further is required. This box can be re-checked if additional information is received.
  - Date Received Date Documentation Received
- **Med Cert Due Date** originally populated from Eligibility Notice. You may update this field going forward if additional medical is required.
- **Frequency Duration** originally populated from Designation Notice Intermittent Leave. You may update this field if additional documentation is received.
- **Fitness for Duty Required Checkbox** originally populated from Designation Notice. You may uncheck this if nothing further is required. This box can be re-checked if additional information is received.
  - Date Received Date Fitness for Duty Received
- On Probation Checkbox/Probation End Date Field if an employee is on probation, there are certain factors in
  which their probation could be extended due to an extended medical leave. Review an employee's
  probationary status in STAR (Human Resources>Person Profiles>Employee Status) and enter the information as
  applicable.



- o If on probation, click the On-Probation Checkbox and the enter the Probation End Date.
- Click the Flag for **Annual Recertification checkbox** if an employee will most likely need to submit a new request and medical documentation in the following year (i.e. Chronic Condition, intermittent leave approved for calendar year, etc.)
- Click the **Agency Designation checkbox** if you are issuing a Designation Notice/approving FMLA on behalf of an employee who has not provided medical documentation or initial notification.

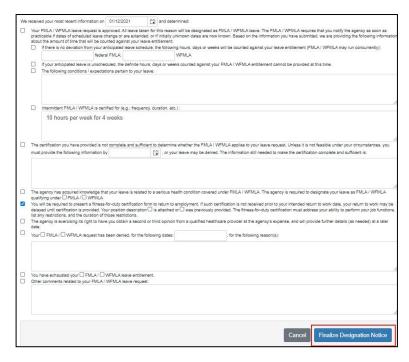
#### **Designation Notice**

After you receive sufficient information/documentation (i.e. Medical Certification), you have 5 days to issue the Designation Notice. If you were provided medical documentation at the time the request was submitted, or if none was required, you can complete the Designation Notice at the same as the Eligibility Notice.

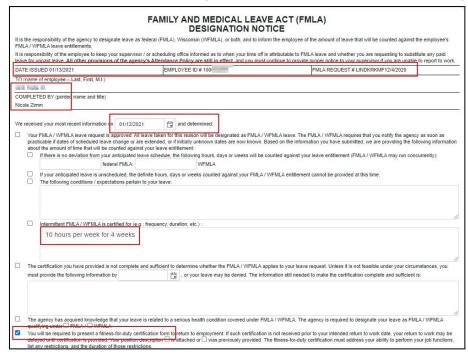
1. Click on Save and Create Designation Notice in the FMLA Coordinator Workspace to generate the notice.



2. The following details are pre-populated:

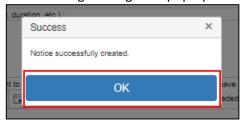


- a. Date Issued (today's date)
- b. Employee ID
- c. FMLA Request #
- d. Employee's Full Name
- e. Coordinator's Name
- f. Any information entered in the FMLA Coordinator Workspace relative to date documentation received, the need for a fitness-for-duty certification form, text entered in the Frequency Duration text box.

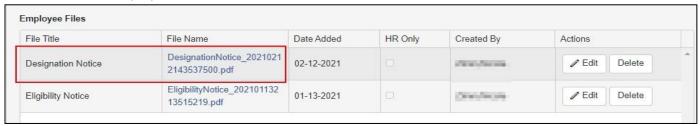


- 3. The Medical Coordinator must complete all other applicable fields on the form.
- 4. Once the form is complete, click the **Finalize Designation Notice** button
  - a. If you do not want to finalize, click Cancel to go back

5. The following message will pop-up once the notice is created. Click **OK**.



6. The Designation Notice will populate in the Employee Files section of Additional Documentation. The form will also be visible to the employee.



7. Frequency Duration and the checkbox for Fitness for Duty Required will autofill to Workspace if completed in the Designation Notice.

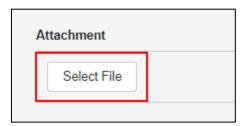
#### Additional Documentation

Under Additional Documentation you may upload, edit, and delete files. You may also add and edit notes.

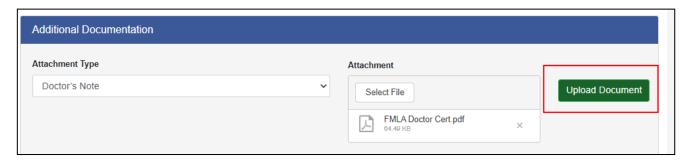
- 1. To add a file
  - a. Select the Attachment Type from the drop-down menu.



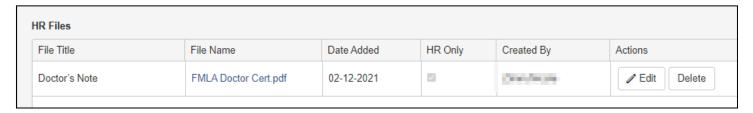
b. Click the Select File button under Attachment.



c. Select your file and click the **Upload Document** button.



d. Any file the Medical Coordinator uploads will populate under HR Files and will NOT be visible to the employee.



- 2. To add and manage notes:
  - a. Type the next of the note in the Add a Note box and click the Save Note button



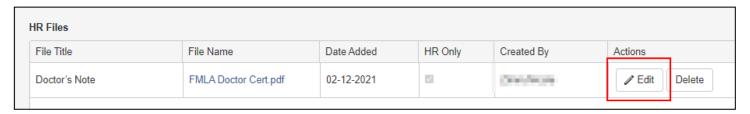
b. Once the note is saved, it will appear in the HR Notes section of the page.



c. Another Medical Coordinator can NOT edit your note; however, you can edit your own note. Click on the **Edit** button to update the note. Once the note is updated, click the **Update** button to save your changes.



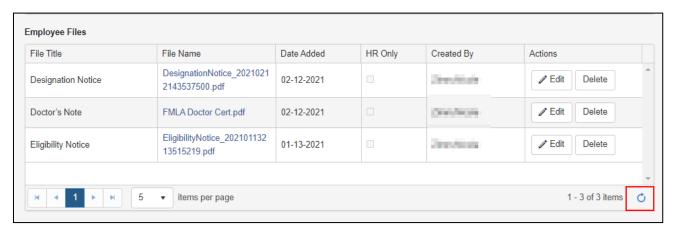
- 3. Managing Employee and HR Files
  - a. All files listed under Employee Files are visible to the employee
  - b. All files listed under HR Files are only visible to the HR coordinator
  - c. If you want to make a file under HR Files visible to the employee, click the Edit button



i. Once you click the **Edit** button, the File Name and the HR Only checkbox are available for editing. Uncheck the HR Only checkbox to allow the employee to see the file. Click **Update** to save.



ii. Click on the **Refresh** icon under both Employee Files and HR Files to see the file move to the Employee Files section.



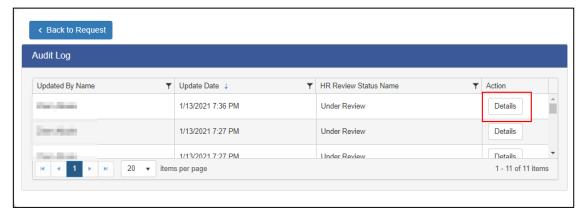
#### **Audit Log**

When an update occurs on a request, the values of certain fields are saved to an audit table in the database. On this page you can view each time the request has been saved, and by whom.

1. Click the Audit Log button just above the FMLA Coordinator Workspace to access the log.



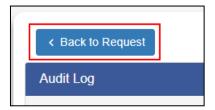
2. Click on the **Details** button in any row to see the information in the request at a specific point in time.



The following information is tracked within the Audit Log



4. Click on **Back to Request** to access original request.



# Edit a Request

The Edit functionality allows you to both assign the request to a Medical Coordinator and to edit specific fields within the request.

1. Click on the Edit button at the top of the employee's request page to access the Edit page.



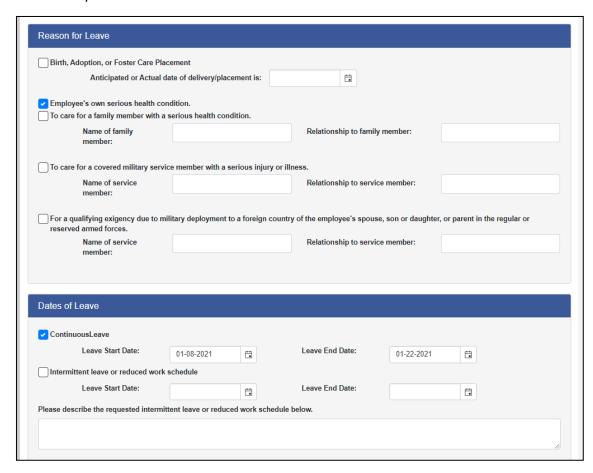
2. You may assign the request to another coordinator in your row level security, or you can assign a request to yourself from this dropdown menu.



3. You may edit contact info during leave.



4. You may edit the reason for leave and the dates of leave.



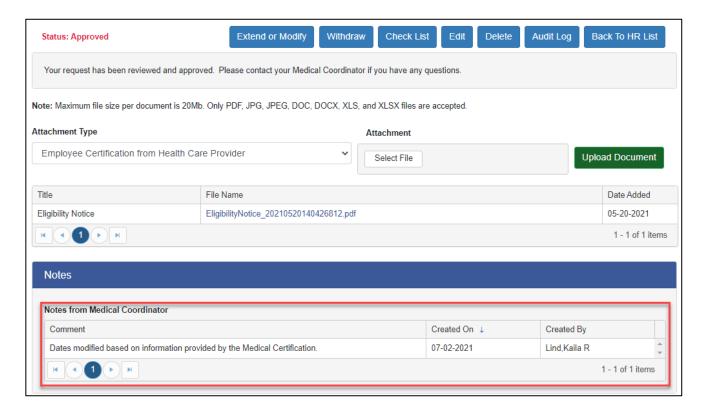
5. When changes are made to an employee's request, enter a comment that will be displayed to the employee.



6. Click Save at the bottom of the page when edits are complete.



7. The updates made will now be visible to the employee and to you on the employee's request.



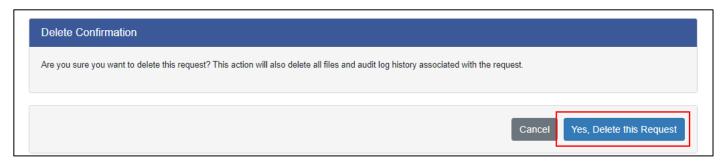
# Delete a Request

If a request was made in error and should be deleted (deleted = there will be no record of the request in the FMLA application), you can do the following:

- 1. Click on the employee's request from the FMLA Requests Grid.
- 2. Click the Delete button on the top of the employee request page.



3. The following message will display. Click Yes, Delete the Request to continue.



4. You will be brought back to the FMLA Requests grid and **Record deleted** will display at the top of the page. There will no longer be any record of the request in the FMLA application.



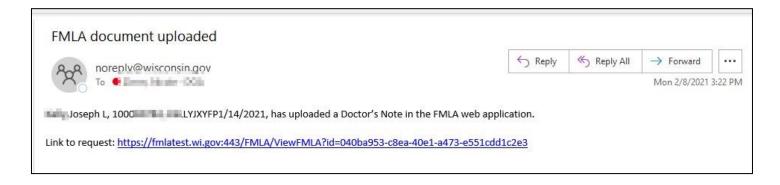
#### **Notifications**

The assigned Medical Coordinator will receive a notice from the application in three situations – when an employee submits a Change Request, withdraws their application, and uploads a document to their request. The email will include the employee's name, Employee ID and FMLA Request Number.

**Note:** There is no notification when an employee initially submits a request – the Medical Coordinator must review the requests in the application to identify new requests.



The email when a document is uploaded is slightly different from the 2 others. It lets you know what type of document has been uploaded and includes a link to the request. You must already be logged into the FMLA application when you click on the link. If you are not logged into the application, you will receive an error.

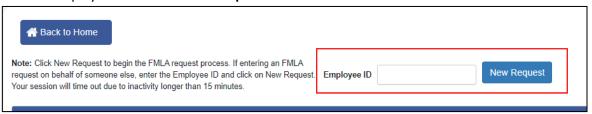


# Create a Request on Behalf of an Employee

1. Go to the Dashboard screen and click on Medical Leave & FMLA Request.



2. Enter an Employee ID and click New Request.



- 3. If you do not have the row level security to manage that user, you will see an error message. Otherwise, you will be redirected to the New Request screen where you may begin setting up the request. Please see the <a href="Employee FMLA">Employee FMLA</a>
  <a href="Quick Guide">Quick Guide</a> for reference.</a>
- **4.** When the request is complete, select **Review and Submit.** You will be brought to the submission page. Scroll to the bottom to complete the **Submission Acknowledgement.** 
  - a. Under Name of Person Submitting Request, enter your name followed by "on behalf of employee."
  - b. Click the Submit Request button



- 5. Once the request is submitted, you will receive a message that the request was submitted successfully at the top of the screen.
  - a. You can then click on the Accept Request button to assign the request to yourself.



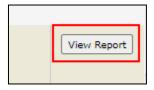
# Reports

# Medical Leave & FMLA System Reports

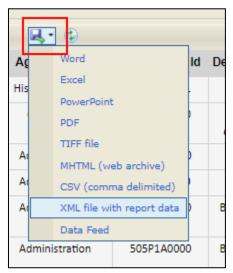
Reports are accessed by clicking on the drop down next to Reports in the upper right of the banner on any page in the application.



Once you click on a report, you can select your criteria at the top of the page (if you need to update it) and then click the **View Report** button on the far right of the page (you will likely need to scroll all the way to the right to see the **View Report** button).



You can also download your report into Excel or a variety of other formats by clicking on the download button on the report page.



Review the following reports as needed or on a scheduled basis:

#### **Upcoming End Date Report**



Run: Weekly, Biweekly, Monthly

**Use:** Identify requests with an upcoming end date in the next 7, 14 or 30 days. Request that do not need to be extended will need have their statuses updated to "Closed".

#### **Awaiting Documentation Report**

Run: Daily, Weekly

**Use:** This report will be used to quickly identify requests that are awaiting documentation. The request must be in Awaiting Documentation status to appear on this report.

#### **Fitness for Duty Report**

Run: Weekly, Monthly

**Use:** To identify individuals who may be returning from leave that require a Work Release. The "Fitness for Duty Required" checkbox in the FMLA Coordinator Workspace must be checked on the request to appear on this report.

#### **Intermittent Leave Report**

Run: Monthly

**Use:** Cross reference FMLA used in STAR with the Frequency Duration within the request. The employee's FMLA leave balance and FMLA hours used to date are included in this report.

#### **Block Leave Report**

Run: Per Pay Period

**Use:** Cross reference FMLA entered on employee's timesheet in STAR. The employee's FMLA leave balance and FMLA hours used to date are included in this report.

#### Status/Reason Report



Run: As needed

**Use**: For internal reporting. Can search by Leave Reason, Application Status, a date range and by Business Unit. Uncheck the boxes next to "Null" in the date search to enter a specific date range.

#### Leave Requests Per Year Report

Run: Annually or On Demand

**Use:** Can be used to count active FMLA cases at a specific point in time and/or count total FMLA cases for a specific year.

#### **Annual Recertification Report**

Run: Annually (mid-November)

**Use:** Identify those who may need FMLA in the upcoming year. The "Flag for Annual Recertification" checkbox must be checked in the FMLA Coordinator Workspace on the request to appear on this report. Send reminder email for recertification.

#### **Employee Leave Request History Report**

Run: As Needed

Use: See all requests pertaining to a specific employee. Will be able to see requests outside of row-level security.

#### **Deleted Documentation Report**

Run: Monthly

**Use:** This report is used to identify documents that have been deleted from an employee's request. You can search by Empl ID by unchecking the box next to NULL or you can run the report wide-open so everyone within your security appears on the report.



#### **Documentation Upload Report**

Run: Daily, Weekly

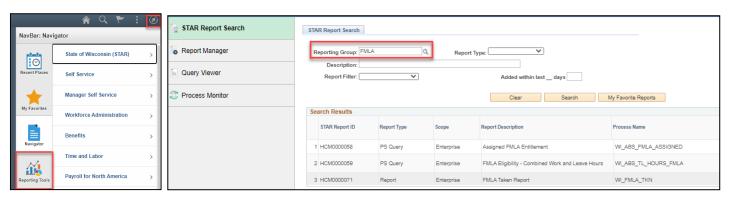
**Reminder:** The assigned coordinator will also receive an email when an employee uploads a document to a request.

**Use:** To identify documents that employees have uploaded to their Requests. Documents uploaded by the Medical Coordinator, with the exception of the Eligibility and Designation Notices, will also populate on this report. Uncheck the boxes next to NULL to search by Empl ID or a date range.



#### STAR Human Resources HCM Reports

To access reports and queries with STAR, select the navigator button on the top right corner. Select Reporting Tools.



STAR Report Search will display. Enter FMLA in the Reporting Group. Click Search.

#### WI\_ABS\_FMLA\_ASSIGNED Query

Run: Monthly, As Needed

Use: Lists employees who were assigned an FMLA entitlement within a specified date range. Can be used to audit active requests with current entitlements.

#### WI\_ABS\_TL\_HOURS\_FMLA Query

Run: As needed

Use: To determine FMLA eligibility. Lists combined absence and time and labor hours for a specific employee for a specific date range.

#### WI\_FMLA\_Taken Report

Run: Per Pay Period, Monthly, As needed

Use: This can be run for audit purposes, as well as a "big picture" for a specific employee.

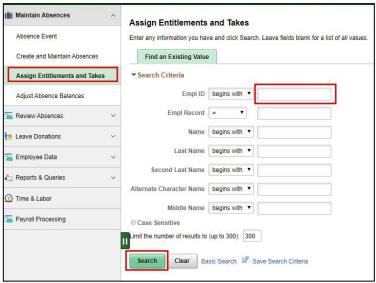
#### WI\_HR\_PER\_ROSTER\_QRY Query

Run: As needed

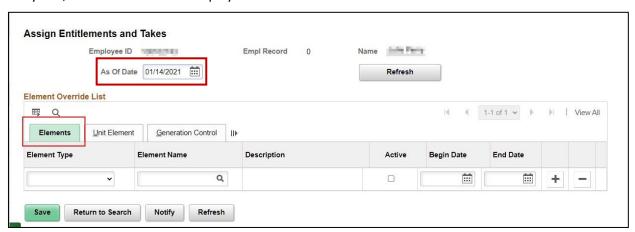
Use: For employees a continuous service date less than one year, run this query to determine if an employee has any other State Service that is not captured in STAR.

# Entering FMLA Entitlements and Takes in STAR (PeopleSoft)

1. **Navigation**: Workforce Administrator Homepage – Payroll Dashboard – Absence Management Tile – Maintain Absences Folder – Assign Entitlements and Takes Page. Enter the Empl ID and click Search.



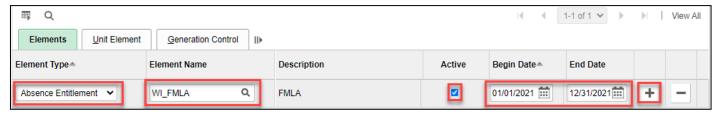
2. You will be brought to this screen. Keep in mind that if an employee has been approved for FMLA in preceding years, these entries will be displayed. **DO NOT CHANGE OR DELETE PRIOR YEAR ENTRIES**.



**Note:** If an employee has a previously entered FMLA entitlement in the current year, you may need to Refresh the *As of Date* to 12/31 of the current year for the entitlement to be displayed.

- 3. On Elements Tab
  - a. Enter Element Type = Absence Entitlement
  - b. Enter Element Name = WI FMLA

- c. Make sure the box under Active is checked
- d. Enter the Begin Date. This is either 1-1-XXXX of the year, or the 1<sup>st</sup> day of the pay period the leave starts.
- e. Enter the End Date. This is either 12-31-XXXX of the year, or the last day of the pay period the leave ends.
  - i. If the leave crosses years, you must enter a 12-31-XXXX end date and then add a new row for the following year.
- f. Then, add a row by clicking on the "+" button.



- g. Enter Element Type = Absence Take
- h. Enter Element Name = WI\_FMLA\_TK
- i. Make sure the Active box is checked
- j. Enter the Begin and End Date. These dates should match the entitlement.



- 4. Go to the Unit Element Tab
  - a. Enter Unit Element Type = Numeric
  - b. Element Name Unit = LEAVE BLANK
  - c. Enter Entitlement Unit = Eligible Number of Hours

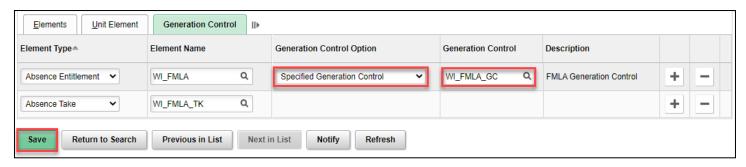
**CAUTION:** 480 hours is the standard entitlement, but an employee may be entitled to a different amount based upon their FTE, number of work hours in the 12-month look back period, or the interaction between state and federal FMLA.

- d. Enter Frequency = Calculate Per Pay Period
- e. Frequency ID = LEAVE BLANK



- 5. On Generation Control Tab
  - a. Enter Generation Control Option = Specified Generation Control

b. Enter Generation Control = WI\_FMLA\_GC



- c. Click Save
- 6. Once the FMLA entitlement and take is entered in STAR, go into the employee's request within the FMLA application and click on the **Check List** button to access the FMLA Coordinator Workspace.
  - a. Check the box next to Entitlement Added to PeopleSoft
  - b. Click Save



#### A few notes about entering FMLA

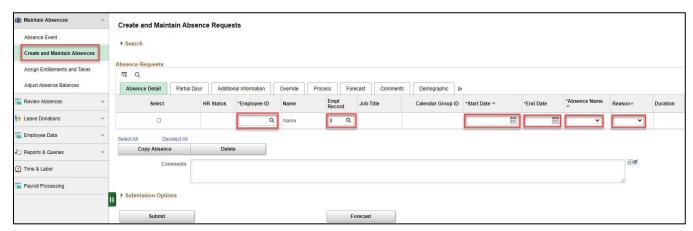
- FMLA Entitlement Entry for Employees with Multiple Jobs: If an employee has active multiple jobs and plans to use FMLA for hours not worked in more than one job, you will need to split the total WI\_FMLA entitlement across the eligible jobs (and enter the applicable FMLA takes on all eligible jobs). The total number of FMLA hours used across all jobs can't exceed the total annual FMLA entitlement.
  - Remember to always attach the leave entitlement to the correct Empl Record
- If there are multiple FMLA requests for the same timeframe, you only need to enter one entitlement and take –
  it will apply to all FMLA leave for that time period.
- You can modify dates and entitlement hours at any time.
- Never DELETE previous or current year FMLA entries.

# Entering FMLA on Behalf of an Employee in STAR (PeopleSoft)

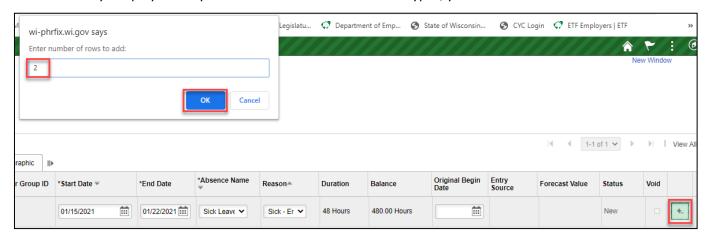
In order to access this page, you must have the AM\_SPECIALIST core user role. If you cannot access this page, you may need to request assistance from payroll staff.

- 1. **Navigation**: Workforce Administrator Homepage Payroll Dashboard Absence Management Tile Maintain Absences Folder Create and Maintain Absences Page. On Absence Detail tab:
  - a. Enter Employee ID
  - b. Verify Empl Record System will default to 0.
  - c. Enter Start Date and End Date You may leave end date blank for one day absences (system autofills)

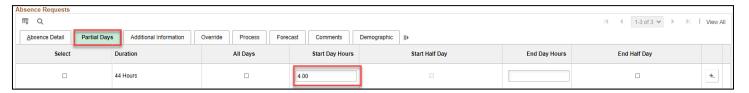
d. Enter Absence Name and Reason



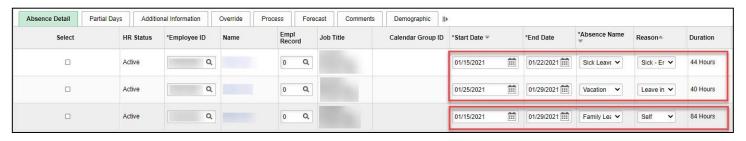
- e. Duration will automatically populate based on the dates entered, and the employee's system work schedule.
- 2. Scroll all the way to the right to find the "+" button to add more rows. You will need at least one additional row for the FMLA entry. Employees may also want to use additional leave types; you can enter them all at the same time.



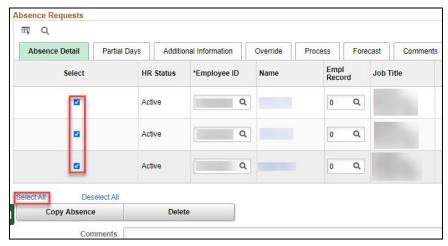
3. Repeat Step 1 for all leave entries. If Partial Days are required, click on the Partial Day tab to enterdetails



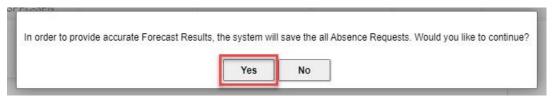
4. Once all leave entries are complete, make sure the dates and duration of your FMLA entry matches the other leave entries.



- Finalize the Leave Entries
  - a. Select each line or Select All



b. Click **Forecast**. You will see the following pop up. Click **Yes**.



c. Reselect Entries. Then, click Submit. If successful, you will see this message. Click OK.



- 6. If you run into errors, select the arrow next to Search at the top of the page to verify the leave entries are in the date range.
  - a. You can also search by employee ID to see other absences the employee has already entered



#### Resources

FMLA Toolkit (DPM website)

HR Handbook Chapter 724 – Family and Medical Leave

# Appendix: Template Communications

The following are templates you can use to reach out to employees when you roll-out the application, as well as templates you can use for different situations during the FMLA request process.

#### FMLA System Launch Email

Subject: Introduction the new FMLA & Medical Leave System

#### Message:

Hello!

You are receiving this email because you have identified a current or upcoming need for FMLA & Medical Leave. As your Medical Leave Coordinator, I am excited to announce that DET, in collaboration with the enterprise FMLA Workgroup, has developed and launched an electronic State of Wisconsin FMLA & Medical Leave System. As of [Launch Date], all current and future FMLA & Medical Leave requests will be administered through the system.

#### What does this mean?

You will have access to request, edit, and view your FMLA & Medical Leave requests as well as upload and view all documents associated with your request.

#### What do you need to do?

- Log into the new system using the link below. Your login and password are the same logins as PeopleSoft.
- Follow the step-by-step instructions in the FMLA System Employee Quick Guide.
- You will receive follow up communication after your request has been reviewed to let you know if your request
  is approved or if further information is required.

State of Wisconsin FMLA & Medical Leave System: <a href="https://fmla.wi.gov">https://fmla.wi.gov</a>

Keep in mind that this system maintains confidentiality and only the Medical Leave Coordinators have access to view your requests. Please let me know if you experience any system issues or have any other questions or concerns.

#### Medical (FMLA) Leave Templates

#### Inquiry

Thank you for your inquiry. You may be entitled to FMLA & Medical Leave benefits:

- Federal FMLA up to 12 weeks\*
- Wisconsin FMLA up to 2 weeks\*
- Agency Medical Leave for employees who are not eligible or have exhausted FMLA.

Please login into the FMLA & Medical Leave system to:

- 1. Submit your request(s).
- 2. Upload the completed Certification of Health Care Provider (<u>Employee</u> or <u>Family Member</u>). This may also be sent directly to the Medical Leave Coordinator by email [include email] or fax [include fax number].

<sup>\*</sup>Leave programs run concurrently, and while these leave programs are technically unpaid, you may use any accrued leave balances, including sick leave.

See the <u>FMLA System Employee Quick Guide</u> for step-by-step FMLA Application instructions. Further information on FMLA & Medical Leave can be found at <u>DPM's FMLA Toolkit</u> or [Agency/Region Intranet Site]. Please let me know if you have any other questions.

Thanks,

#### Eligibility – Medical Certification Required

Your request for medical leave has been received, but is not yet approved, as we are still waiting on the Medical Certification which is due by [Due Date].

Please login into the FMLA & Medical Leave system to:

- View the status and details of your current request, including your Eligibility Notice.
- Upload the completed Certification of Health Care Provider (<a href="Employee"><u>Employee</u></a> or <a href="Family Member"><u>Family Member</u></a>). This may also be sent directly to the Medical Leave Coordinator by email [include email] or fax [include fax number].

See the <u>FMLA System Employee Quick Guide</u> for step-by-step FMLA Application instructions. Further information on FMLA & Medical Leave can be found at <u>DPM's FMLA Toolkit</u> or [Agency/Region Intranet Site]. Please let me know if you have any other questions.

Thanks,

#### Approval

TO: Employee; CC: Supervisor – Remove bullet points that do not pertain to the situation. (i.e. Intermittent Leave – you only need: Absence, Notification, etc.)

Your request for [Leave Type] medical leave for your [Self or Family serious health condition] is approved from [Start Date] to [End Date] based on the information provided in the Certification by Health Care Provider. [Include Frequency Duration Details]

Please login into the FMLA & Medical Leave system to:

- View the status and details of your approved request.
- View/download all documents associated with your request, including your Eligibility and Designation Notices.
- If applicable, request a modification or extension to your request. See page 3 of the <u>FMLA System Employee</u> Quick Guide

Here is some additional information and instructions that pertain to your approved leave:

- Absences. You may use any accrued paid leave type or Leave without Pay (LWOP). Please note that use of LWOP impacts the number of sick leave hours earned and accrued annual leave, including legal holidays. These absences must also be entered as FMLA. This is a two-step process in PeopleSoft. Please refer to the <u>FMLA</u> <u>System Employee Quick Guide</u> for full instruction.
- **Notification**. You must notify your supervisor, in advance, of any scheduled appointments. If your absence is due to a flare-up episode, please follow your unit's normal call-in procedures to notify your supervisor and specify the absence is due to FMLA.
- **Insurance.** Your insurance(s) will continue while you are on leave. If you are receiving a full or partial paycheck, your premiums will continue to be deducted from your paycheck.

Please contact [Agency/Region Contact] for questions about benefits or to discuss prepayment or personal check options.

- Filing an ICI Claim? Please refer to ETF Instructions: Claim Filing Instructions for ICI Benefits
- Return to Work. You must provide a Work Release before you will be able to return to work at any capacity
  (alternate duty, working remotely, etc.). A work release must include: a return to work date, if there are any
  restrictions, and a next evaluation date. Acceptable Work Release: Dr. Note, Clinic From, or <u>Fitness for Duty</u>
  <u>Certification</u>, etc.

You may upload your work release directly in the FMLA & Medical Leave system, or it may also be sent to the Medical Leave Coordinator by email [include email] or fax [include fax number].

If you have questions or need assistance, please let me know.

Thanks,

#### Agency Designation

#### TO: Employee; CC: Supervisor

We received notification from [your supervisor] that you are/were out for medical purposes. As such we are designating your leave as FMLA beginning [Date]. Federal FMLA entitles you to 12 weeks (480 hours) of leave. Wisconsin FMLA entitles you to two (2) weeks (80 hours) of leave. The Federal and Wisconsin FMLA leave run concurrently and entitle you to a total of 12 weeks, or 480 hours, of FMLA leave in a calendar year (January to December).

To review the status and details of your request, please login into the FMLA & Medical Leave system to:

- View/download all documents associated with your request, including your Eligibility and Designation Notices.
- Request a modification or extension to your request, if applicable. See page 3 of the <u>FMLA System Employee</u>
   Quick Guide

Here is some additional information and instructions that pertain to your approved leave:

- Absences. You may use any accrued paid leave type or Leave without Pay (LWOP). Please note that use of LWOP impacts the number of sick leave hours earned and accrued annual leave, including legal holidays. These absences must also be entered as FMLA. This is a two-step process in PeopleSoft. Please refer to the <u>FMLA</u> <u>System Employee Quick Guide</u> for full instruction.
- Notification. You must notify your supervisor, in advance, of any scheduled appointments. If your absence is
  due to a flare-up episode, please follow your unit's normal call-in procedures to notify your supervisor and
  specify the absence is due to FMLA.
- **Insurance.** Your insurance(s) will continue while you are on leave. If you are receiving a full or partial paycheck, your premiums will continue to be deducted from your paycheck.
  - Please contact [Agency/Region Contact] for questions about benefits or to discuss prepayment or personal check options.
- Filing an ICI Claim? Please refer to ETF Instructions: Claim Filing Instructions for ICI Benefits
- **Return to Work**. You **must** provide a Work Release before you will be able to return to work at any capacity (alternate duty, working remotely, etc.). A work release must include: a return to work date, if there are any restrictions, and a next evaluation date.

You may upload your work release directly in the FMLA & Medical Leave system, or it may also be sent to the Medical Leave Coordinator by email [include email] or fax [include fax number].

If you have questions or need assistance, please let me know.

Thanks,

#### Exceed Approved FMLA

You are receiving this email because you have been approved for intermittent Family & Medical Leave (FMLA) for [your own or family member's] medical condition for [Frequency Duration]. However, you have exceeded the allowable number of absences according to the current medical certification.

In order for the exceeded absence(s) to be considered as protected under FMLA, you must provide an updated <u>Medical</u> Certification for Serious Health Condition by [Due Date].

Required forms can be submitted in the following ways:

- Direct Upload: FMLA & Medical Leave System
- Email: Agency/Region Email
- Confidential Fax: Agency/Region Fax

If the updated certification is not received, your exceeded absence(s) listed above, and any absences exceeding your current Certification of Health Care Provider in the future, will not be covered under FMLA.

Further information on FMLA & Medical Leave can be found at <u>DPM's FMLA Toolkit</u> or [Agency/Region Intranet Site]. Please let me know if you have any other questions.

Thanks,

#### Denied

#### Medical Certification Not Received

The medical certification required to support your FMLA request was not received within the required timeframe. As such, we do not have sufficient information to designate your leave as FMLA and therefore, your request has been denied.

Please login to the FMLA & Medical Leave system to:

- View the status and details of your denied request.
- View/download all documents associated with your denied request, including your Eligibility and Designation Notices.
- Upload the completed Certification of Health Care Provider (<u>Employee</u> or <u>Family Member</u>) if leave is still needed.
   This may also be sent directly to the Medical Leave Coordinator by email [include email] or fax [include fax number].

See the <u>FMLA System Employee Quick Guide</u> for step-by-step FMLA Application instructions. Further information on FMLA & Medical Leave can be found at <u>DPM's FMLA Toolkit</u> or [Agency/Region Intranet Site]. Please let me know if you have any other questions.

Thanks,

#### Parental (Birth) Leave

#### Inquiry

Congrats on the upcoming addition! You may be entitled to Parental Leave benefits:

- Federal FMLA up to 12 weeks\*
- Wisconsin FMLA up to 6 weeks\*
- ER 18.14(2), Wis. Adm. Code up to 6 months\*

Please login to the <u>FMLA & Medical Leave system</u> to submit your request about 1-2 months prior to the start of your leave.

Further information on FMLA can be found at <u>DPM's FMLA Toolkit</u> or [Agency/Region Intranet Site]. You can also visit ETF's web page for <u>Life Changes - Birth, Adoption, or Placement</u>. Please review and let me know if you have any other questions.

Thanks,

#### Approval

Congratulations on your upcoming new arrival. You indicated that you would like to take medical leave because of the expected birth of your child from approximately [Start Date] to [End Date].

Please login to the FMLA & Medical Leave system to:

- View the status and details of your approved request.
- View/download all documents associated with your request, including your Eligibility and Designation Notices.
- Request a modification or extension to your request, if applicable. See page 3 of the <u>FMLA System Employee</u>
   Quick Guide

Here is some additional information and instructions that pertain to your approved leave:

- Absences. You may use any accrued paid leave type or Leave without Pay (LWOP). Please note that use of LWOP impacts the number of sick leave hours earned and accrued annual leave, including legal holidays. These absences must also be entered as FMLA. This is a two-step process in PeopleSoft. Please refer to the <u>FMLA</u> System Employee Quick Guide for full instruction.
- **Insurance.** You will need to review ETF's web page for <u>Life Changes Birth, Adoption, or Placement</u> about any changes that you will need to make to your insurances. Applications can be found here.
  - Your insurance(s) will continue while you are on leave. If you are receiving a full or partial paycheck, your premiums will continue to be deducted from your paycheck.
  - Please contact [Agency/Region Benefits Contact] for questions about benefits or to discuss prepayment or personal check options for unpaid leaves.
- Other Considerations. If you pay for parking and will be out for an extended period, you may also wish to contact your parking coordinator to discuss your options.

If you have questions or need assistance, please let me know. Thanks, and good luck with the new addition!

<sup>\*</sup>All leave programs run concurrently. And while these leave programs are technically unpaid, you may use any accrued leave balances, including sick leave.

#### Agency Designation

Congrats on the new addition! Did you know that having a baby/adopting is an FMLA Qualifying event? We, as your employer, are <u>required</u> to designate any leave, related to this reason, as FMLA for eligible employees, even if you are using paid time.

Here are parental leave benefits, you may be entitled to:

- Federal FMLA up to 12 weeks\*
- Wisconsin FMLA up to 6 weeks\*
- ER 18.14(2), Wis. Adm. Code up to 6 months\*

Please login to the FMLA & Medical Leave system to:

- View the status and details of your current request.
- View/download all documents associated with your request, including your Eligibility and Designation Notices.
- Request a modification or extension to your request, if applicable. See page 3 of the <u>FMLA System Employee</u>
   Quick Guide

Here is some additional information and instructions that pertain to your designated leave:

- Absences. You may use any accrued paid leave type or Leave without Pay (LWOP). Please note that use of LWOP impacts the number of sick leave hours earned and accrued annual leave, including legal holidays. These absences must also be entered as FMLA. This is a two-step process in PeopleSoft. Please refer to the <u>FMLA</u> <u>System Employee Quick Guide</u> for full instruction.
- **Insurance.** You will need to review ETF's web page for <u>Life Changes Birth, Adoption, or Placement</u> about any changes that you will need to make to your insurances. Applications can be found <u>here</u>.
  - Your insurance(s) will continue while you are on leave. If you are receiving a full or partial paycheck, your premiums will continue to be deducted from your paycheck.
  - Please contact [Agency/Region Benefits Contact] for questions about benefits or to discuss prepayment or personal check options for unpaid leaves.
- Other Considerations. If you pay for parking and will be out for an extended period, you may also wish to contact your parking coordinator to discuss your options.

If you have questions or need assistance, please let me know. Thanks, and good luck with the new addition!

#### **FMLA Exhausted**

This email is to inform you of the status of your leave and request additional information. Your FMLA entitlement for [year] [will exhaust/has exhausted] as of [Date]. Therefore, [you are no longer/will no longer be] protected under FMLA law.

If you are able to return to work, you must submit a Work Release. A work release must include: a return to work date, if there are any restrictions, and a next evaluation date. You may upload your work release directly in the <a href="FMLA & Medical Leave system">FMLA & Medical Leave system</a>, or it may also be sent to the Medical Leave Coordinator by email [include email] or fax [include fax number].

If it is your intention to request an extension of leave, you must submit a Leave Without Pay (LWOP) Request with supporting medical documentation no later than [DATE].

<sup>\*</sup>All leave programs run concurrently. While these leave programs are technically unpaid, you may use any accrued leave balances, including sick leave.

Failure to submit this request will result in you being considered on unauthorized leave. Unauthorized leave may lead to discipline up to and including termination of employment.

Your next opportunity to re-apply for FMLA coverage, if needed, will be [DATE].

Further information on FMLA & Medical Leave can be found at <u>DPM's FMLA Toolkit</u> or [Agency/Region Intranet Site]. Please let me know if you have any other questions.

#### Annual Recertification Email

Send Annual Reminder - Mid November.

**Subject: [Year] FMLA Recertification** 

#### **BCC: Report from FMLA System - Flagged for Annual Recertification**

You are receiving this email because you requested intermittent medical leave in [Year]. Because FMLA is approved on a calendar year basis, if you will continue to need leave for medical purposes, please submit a new request and Medical Certification (completed by a health care provider) for <u>each</u> qualifying medical condition and for <u>each</u> qualifying person.

Please login to the FMLA & Medical Leave system to:

- 1. Submit your request(s).
- 2. Upload the completed Certification of Health Care Provider (<u>Employee</u> or <u>Family Member</u>). These may also be sent directly your Medical Leave Coordinator by email or fax.

See the <u>FMLA System Employee Quick Guide</u> for step by step FMLA Application instructions. If you no longer have a need for FMLA, please respond to this email indicating that you will not be applying for FMLA.

Thanks,

#### FMLA System and Audit Templates

#### **Draft Status**

In an audit of the FMLA System, you are currently showing a request in "Draft" status indicating your request has not been submitted. If you are not ready to submit yet, then you may disregard this notice. However, if you are ready to submit your request, please complete the following:

- Log into the FMLA & Medical Leave system
- Select your "Draft" status request
- Review the information for accuracy.
- On the "Review and Submit" screen, scroll to the bottom, enter your electronic signature, and click "Submit Request"

Your request can be submitted before you have obtained medical documentation. See the <u>FMLA System Employee</u> <u>Quick Guide</u> for step-by-step FMLA Application instructions. Please let me know if you have any questions or experience any issues.

Thanks!